

USDA Weekly Retail Turkey Feature Activity

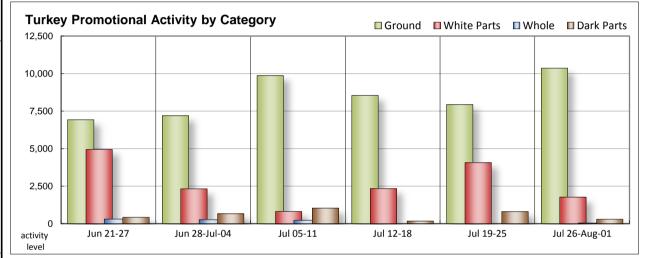
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/26 thru 08/01.

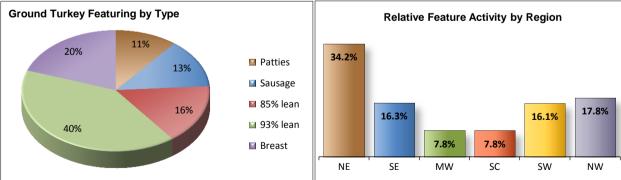
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY											
				WEEK							
	THIS	WEEK	LAST YEAR								
Feature Rate 1/	45.5%	of 23,200	37.0%	of 23,200	32.4% of 22,500 outlets 1.4%						
i cature ivate	ou	tlets	ou	tlets							
Special Rate 4/	6.	1%	2.	.0%							
Activity Index 2/	13	,670	14	,080	11,220						
3/	Stores	Wtd Avg	Stores Wtd Avg		Stores	Wtd Avg					
WHOLE BIRDS:											
Fresh - Hens					10	1.48					
" - Toms					10	1.48					
Frozen - Hens	30	1.12									
" - Toms	20	1.19									
PARTS:											
Breast:											
Bone-in, whole											
Fresh	10	2.49	20	2.49	40	2.79					
Frozen	330	1.67	810	1.63	310	1.79					
Split, bone-in											
Fresh	50	2.99	250	2.99	50	2.94					
Rotisserie	420	7.96	840 7.49		10	8.99					
Boneless, whole	100	5.14	180	4.99							
Cutlets	580	4.89	830	4.25	310	4.36					
Cutlets, thin sliced					10	5.99					
Strips			170	4.99	100	4.99					
Tenders	280	4.47	970		200						
Marinated Tenders	730		400		1,030						
Drumsticks	80		290		420	1.87					
Thighs			180	1.99	170	1.99					
Wings	30	1.88	300	1.98	350	1.86					
Necks	20	1.57	10	1.39	160	1.74					
Smoked Drumsticks	60	1.86	10	1.89	40	1.99					
Smoked Wings	80	1.89	10	1.89	110	1.80					
Smoked Necks	30	1.89	10	1.89	60	1.99					
GROUND TURKEY:	10,360	3.37	7,940	3.41	7,390	3.68					
Patties	1,120	3.20	770	3.24	500	3.56					
Sausage	1,360	3.30	1,070	3.50	1,040	3.54					
85% lean	1,640	2.79	760	2.67	620	2.40					
93% lean	4,200	3.22	4,510	3.24	2,130	3.10					
Breast	2,040	4.41	830	4.97	3,100	4.50					
Rolls (frsh/frz 1 lb.)	180	1.62	260	2.43	270	1.90					
Specialty 5/											
Patties	110	3.68	180	4.36	60	4.43					
93-94% lean	150		390	4.66	80	4.15					
Breast	20		30		30	5.99					
Note: rolls & specialty no	t included	in ground t	urkey tota	al and weigh	ted average	ge.					

This Week's Turkey Feature Highlights

End of month promotional activity on turkey declines, although incentives to purchase increase. A very small number of stores feature frozen hens and toms. Offerings on fresh and frozen bone-in breasts slow; prices are unchanged on fresh, higher on frozen. Fewer stores are promoting rotisserie breasts; advertised prices are higher. Feature activity declines on all of the white parts with the exception of marinated tenders; prices are higher on everything except the marinated tenders, making marinated tenders a good choice for grilling this week. Retailers show limited interest in promoting dark parts. Ground turkey is where the action is this week. Feature activity increases on all grinds with the exception of 93% lean, although the 93% lean remains the most actively promoted item. Prices are mixed but mostly lower on grinds. Overall deli market activity slows. More stores are offering service deli items, especially thick slicing meats. Self-service deli offerings are fewer in number; an increase in ads promoting processor brands could not make up for the sharp decline on ads featuring private brands.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



Fri. Jul 26, 2013

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/26 thru 08/01.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTH	IEAST U.S.		SOL	JTHEAST U.S.		MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI) 23.2% of 4,200 sampled outlets				
	(CT,DE,MA,MD,M	E.NH.NJ.NY.PA.F	RI.VT)	(AL.FL.GA.I	MS,NC,SC,TN,VA,W	/V)					
Feature Rate 1/	, , , , , ,	0 sampled outlet	,	,	,100 sampled outle	,					
Special Rate 4/	2.9% of stores w	•			s w/ no-price prom		· ·	0.2% of stores w/ no-price promotions			
Activity Index 2/		ndex = 5,430	tions		ity Index = 3,520	Otions	• •				
Activity ilidex	Price Range	Summar	V	Price Range	Summa	r\/	Activity Index = 1,130 Price Range Summary				
	(\$/pound)	Stores Wtd Avg		(\$/pound)		Ntd Avg	(\$/pound)		Vtd Avg		
	(φ/ροαπα)	Otores v	viarivg	(φ/ροαιία)	Otores	rrta rivg	(φ/ροαπα)	Otores (via rivg		
WHOLE BIRDS:											
Fresh - Hens											
" - Toms											
Frozen - Hens							0.99	10	0.99		
" - Toms											
PARTS:											
Breast:											
Bone-in, whole											
Fresh											
Frozen	1.79	180	1.79	1.48	30	1.48	1.48 - 1.79	90	1.53		
Split, bone-in											
Fresh	2.99	50	2.99								
Rotisserie	6.89 - 8.99	90	7.45				7.99	30	7.99		
Boneless, whole	3.99 - 5.99	70	5.06	5.99	20	5.99					
Cutlets	3.99 - 5.99	480	4.89	3.99 - 5.99	50	4.51	3.98 - 4.99	20	4.74		
Cutlets, thin sliced											
Strips											
Tenders	3.99 - 5.99	190	4.40	3.99 - 5.99	50	4.51	3.98	10	3.98		
Marinated Tenders	3.99 - 4.26	640	4.21	4.26	70	4.26					
Drumsticks	1.39	50	1.39				1.29 - 1.69	20	1.57		
Thighs											
Wings	2.49	10	2.49				1.29 - 1.69	20	1.57		
Necks							1.29 - 1.69	20	1.57		
Smoked Drumsticks	1.99	20	1.99	1.79	40	1.79					
Smoked Wings	1.99	20	1.99	1.79 - 2.29	50	1.90	1.69	10	1.69		
Smoked Necks	1.99	20	1.99				1.69	10	1.69		
GROUND TURKEY:											
Patties	2.99 - 3.50	320	3.11	3.00 - 3.50	560	3.11	3.69	10	3.69		
Sausage	3.19 - 4.09	600	3.54	3.00 - 3.19	450	3.01	2.66	20	2.66		
85% lean	2.30 - 3.33	560	2.80	2.49 - 2.99	410	2.53	2.50 - 2.66	20	2.62		
93% lean	3.07 - 3.84	1,210	3.42	3.00 - 3.79	1,620	3.11	2.69 - 3.50	620	3.15		
Breast (99-100% lean)	4.61 - 5.48	690	4.73	3.84 - 4.61	110	4.30	4.16 - 4.99	90	4.86		
Rolls (frsh/frz 1 lb.)				1.69	60	1.69	1.50	100	1.50		
Specialty 5/											
Patties	3.49 - 4.49	90	3.76				3.33	20	3.33		
93-94% lean	3.99	130	3.99				3.99	10	3.99		
Breast	6.99	10	6.99								



USDA Weekly Retail Turkey Feature Activity

Fri. Jul 26, 2013

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 07/26 thru 08/01.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH C	ENTRAL U.S.		SOU	THWEST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)				
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX	.UT)		(CA,HI,NV)					
Feature Rate ^{1/} Special Rate ^{4/} Activity Index ^{2/}	21.5% of 4,200 0.0% of stores w/ Activity I	sampled outlet	is	50.7% of 2 0.0% of stores	,900 sampled outlet w/ no-price promoty Index = 1,690		46.5% of 1,200 sampled outlets 10.3% of stores w/ no-price promotions Activity Index = 770			
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores W	/ /td Avg	Price Range (\$/pound)	Summary Stores Wtd Avg		
WHOLE BIRDS: Fresh - Hens " - Toms										
Frozen - Hens " - Toms	1.19 1.19	20 20	1.19 1.19							
PARTS: Breast:										
Bone-in, whole Fresh Frozen	1.48	20	1.48	2.49	10	2.49	1.68	10	1.68	
Split, bone-in Fresh Rotisserie	6.99 - 8.99	210	7.82	8.99	70	8.99	7.99	20	7.99	
Boneless, whole	3.99	10	3.99							
Cutlets	5.72	30	5.72							
Cutlets, thin sliced Strips	-									
Tenders	5.03	30	5.03							
Marinated Tenders	4.39	10	4.39				4.39	10	4.39	
Drumsticks	4.00	10	4.00	1.49	10	1.49	4.00	10	4.00	
Thighs Wings										
Necks Smoked Drumsticks Smoked Wings Smoked Necks										
GROUND TURKEY:										
Patties	3.00	50	3.00	3.49 - 3.99	180	3.67				
Sausage	3.00 - 3.99	140	3.36	3.27	10	3.27	3.27	140	3.27	
85% lean	2.50 - 2.99	100	2.64	2.39 - 3.27	540	3.01	2.71	10	2.71	
93% lean	2.91 - 3.50	240	3.17	3.19 - 3.99	280	3.28	3.19 - 3.59	230	3.21	
Breast (99-100% lean)	4.79	230	4.79	3.99 - 5.38	590	4.08	3.99 - 4.79	330	4.01	
Rolls (frsh/frz 1 lb.) Specialty 5/	1.99	20	1.99							
Patties										
93-94% lean							3.99	10	3.99	
Breast							5.49	10	5.49	



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/26 thru 08/01.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY			NORTHEAST U.S.			SOUTHEAST U.S.			
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)			
Feature Rate 1/	73.7% o	f 23,200	75.6% o	f 23,200	77.8% o	f 22,500							
	sto	res	sto	res	sto	res	88.9% of 4,600 s	sampled out	lets	81.0% of 6,100 sampled outlets			
Activity Index 2/	45.	540	47.	880	45.	700	Activity Inde	•			lex = 10,440		
	-,		Í		,		Price Range	Sumr	,	Price Range	Summary		
CERVICE DELL Turber	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	(\$/pound)	Stores	Wtd Avg	(\$/pound)	Stores \	Ntd Avg	
SERVICE DELI - Turkey													
Category 1 Processor Brand	6,000	7.81	2,830	8.06	5,540	7.92	5.99 - 10.99	2,570	7.83	6.99 - 9.99	2,580	7.90	
Private Brand	2,270	7.55	1,340	7.97	1,860	7.83	6.99 - 7.99	1,750	7.56	7.49	110	7.49	
Category 2	2,210	7.00	1,010	7.07	1,000	7.00	0.00	1,700	7.00	7.10		7.10	
Processor Brand	4,620	5.85	5,880	5.80	5,280	6.05	4.98 - 6.99	2,170	5.99	4.89 - 6.99	360	5.43	
Private Brand	3,010	6.85	3,570	7.02	1,380	6.46	4.99 - 7.99	1,210	7.28	5.99 - 6.49	100	6.31	
Category 3													
Processor Brand	1,020	4.18	1,030	3.82	830	3.86	3.49 - 4.99	440	4.17	3.99 - 4.49	320	4.08	
Private Brand	60	4.98	1,300	4.99	40	4.98	5.48	40	5.48				
Turkey Ham	0.40	0.00	440	0.70	000	0.50	0.00	050	0.05	0.00	40	0.00	
Processor Brand Private Brand	340	3.62	410 40	3.78 4.48	380	3.50	2.99 - 3.99	250	3.65	3.99	40	3.99	
Turkey Pastrami			40	4.40									
Processor Brand	140	3.51	330	4.28	350	3.97	2.99 - 3.99	90	3.26				
Private Brand	140	3.31	330	4.20	120	4.99	2.99 - 3.99	30	3.20				
SERVICE DELI - Chicken					120	4.00							
Category 1													
Processor Brand	2,150	7.74	2,600	7.60	3,120	7.62	5.99 - 9.99	1,310	7.80	5.99 - 8.99	240	7.86	
Private Brand	3,290	7.56	770	7.11	3,070	7.39	6.49 - 9.49	2,850	7.58	6.49 - 7.99	150	7.82	
Category 2													
Processor Brand	70	5.37	210	5.85	120	4.16	5.98	10	5.98				
Private Brand	410	5.87	1,430	5.02	410	6.56				4.99	50	4.99	
SELF-SERVICE DELI													
(dollars per tub or pouch)													
Turkey 7-10 oz	0.700	0.00	5 500	0.05	7 400	0.00	0.40	4 000	0.05	4.00	4.700	0.70	
Processor Brand Private Brand	8,730 1,470	2.88 3.15	5,580 6,590	3.05 3.07	7,460 4,030	2.90 2.75	2.49 - 3.99 2.68 - 3.33	1,060 200	3.05 3.25	1.88 - 3.50 2.29 - 3.99	1,700 900	2.78 3.27	
Turkey 16 oz	1,470	3.13	0,590	3.07	4,030	2.13	2.00 - 3.33	200	3.20	2.23 - 3.33	900	3.21	
Processor Brand	2.040	4.39	2,520	4.95	670	5.42	3.99 - 5.99	490	4.55	3.99 - 5.99	1.430	4.37	
Private Brand	_,0.0		_,0_0		0.0	J	0.00	.55		2.22 0.00	1,.55		
Chicken 7-10 oz													
Processor Brand	8,560	2.88	4,870	3.03	7,040	2.90	2.49 - 3.99	1,060	3.05	1.88 - 3.50	1,670	2.80	
Private Brand	1,360	3.20	6,580	3.07	4,000	2.75	2.68 - 3.33	200	3.25	2.29 - 3.99	790	3.37	

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 07/26 thru 08/01.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	EST U.S. N,ND,NE,OH,SD,WI)		ENTRAL U.S. A,MO,NM,OK,TX,UT)	SOUTHWES (CA,HI,N		NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)			
Feature Rate 1/							69.4% of 1,200 sampled outlets Activity Index = 2,410 Price Range Summary		
) sampled outlets	·	0 sampled outlets	59.5% of 2,900 san	•			
Activity Index 2/	Price Range	ndex = 8,660 Summary	Price Range	ndex = 5,150 Summary	Activity Index Price Range	Summary			
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	_	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	
SERVICE DELI - Turkey	(4/200110)	Cicros maring	(φ/ροαα)	Otoros Triarring	(ψ/ροαα)	neree manag	(φ/ροαιια)	Olores Triaring	
Category 1									
Processor Brand	6.49 - 10.99	530 7.30	6.98 - 7.99	310 7.74	8.99	10 8.99			
Private Brand	6.99 - 7.99	260 7.04	7.49	20 7.49	8.49	130 8.49			
Category 2									
Processor Brand	4.49 - 6.99	1,280 5.74	4.99 - 5.99	400 5.80	4.99 - 5.99	270 5.37	5.98 - 6.99	140 6.71	
Private Brand	5.99 - 6.49	710 6.27	5.99 - 8.49	410 7.23	7.99	40 7.99	5.99 - 7.99	540 6.41	
Category 3									
Processor Brand	2.99 - 4.99	170 4.05	4.49 - 4.99	50 4.83	3.99	10 3.99	3.99 - 5.99	30 5.23	
Private Brand	3.98	20 3.98							
Turkey Ham									
Processor Brand Private Brand	2.99 - 3.49	30 3.33			2.99	20 2.99			
Turkey Pastrami									
Processor Brand	3.49 - 4.89	40 4.23					2.99	10 2.99	
Private Brand									
SERVICE DELI - Chicken									
Category 1									
Processor Brand	5.98 - 7.99	450 7.08	7.79 - 9.49	80 8.17			9.99	70 9.99	
Private Brand	6.99 - 10.99	270 7.19	7.99	20 7.99					
Category 2									
Processor Brand	4.49 - 5.99	60 5.26							
Private Brand	5.99	360 5.99							
SELF-SERVICE DELI									
(dollars per tub or pouch)									
Turkey 7-10 oz									
Processor Brand	1.88 - 3.99	1,980 2.73	2.00 - 2.77	1,830 2.89	2.50 - 3.29	1,350 2.90	2.50 - 3.50	810 3.14	
Private Brand	2.69 - 3.00	250 2.73	3.00	120 3.00					
Turkey 16 oz	0.00 4.00	50 4.15		70 0.55					
Processor Brand	3.99 - 4.99	50 4.13	3.99	70 3.99					
Private Brand									
Chicken 7-10 oz	1 00 2 00	1.050 2.72	2.50 2.27	1 720 2 20	2.50 2.20	1 350 3.00	2.50 2.50	940 344	
Processor Brand	1.88 - 3.99	1,950 2.73	2.50 - 3.27 3.00	1,720 2.89 120 3.00	2.50 - 3.29	1,350 2.90	2.50 - 3.50	810 3.14	
Private Brand	2.69 - 3.00	250 2.73	3.00	120 3.00					

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)